

# *Upon the Death of a Retired City Employee*

Revised March 2003 – Please Retain For Your Records

## *Procedure for survivor or beneficiary of deceased retired city employee:*

1. Contact mortician and assemble all information needed for a decision. It is strongly urged that employee make plans in advance of the need for funeral arrangements as it would save the survivors (a lot of) grief and expense. The mortician can be of help in relations with the Veterans Administration and Social Security and in obtaining copies of the death certificate.
2. Notify concerned agencies and associations of the death and the time and place of the funeral and burial.
3. Notify the City Employees' Retirement System (CERS), 360 E. Second St., Los Angeles, CA 90012, (213) 473-7200 or (800) 779-8328, telling them your relationship to the deceased, and giving deceased's name, Social Security number, and date of death. After they have received a copy of the death certificate, they will assign a counselor who will contact you with further instructions.
4. If the place of death was in the County of Los Angeles, a copy of the death certificate may be obtained from the Los Angeles County Registrar-Recorder, County Clerk. Their main office is at 12400 Imperial Hwy., Norwalk, CA 90650. For a recorded message call (562) 462-2137 or (800) 201-8999. Tell them if the deceased was a veteran. If the death occurred in any other county or state, contact the Bureau of Vital Statistics of that jurisdiction.
5. Contact the City Employees' Retirement System to make arrangements for continuation, if desired, of any family health or dental insurance which had been carried by the deceased.
6. Contact the Social Security Administration, (800) 772-1213, to determine if any Social Security benefits are available to survivors. Try to have the deceased's Social Security or Medicare card available. The nearest Social Security Administration office can be located by looking in the telephone directory in the United States Government section.
7. Contact the U.S. Department of Veteran Affairs, (800) 827-1000, to determine if the deceased was a veteran and for benefits information. If available, give them the veteran's branch of service, serial number and the file number.

(a) Insurance: If the veteran had insurance, ask what steps are necessary for beneficiaries to collect.

(b) Pension: If deceased had been receiving a pension, ask if the dependents (spouse or children) are entitled to benefits.

(c) Benefits: Ask if the deceased veteran had any other benefits, burial expense, etc.

8. Contact the Los Angeles Federal Credit Union to determine if the deceased was a member, (800) 252-4009. They will make arrangements to pay off existing loans and for transferring existing shares and insurance benefits to the estate of the deceased. Credit Union office locations:

Main Office: 300 S. Glendale Ave., Glendale, CA 91205  
(213) 484-8640 and (800)252-4009

L.A. Main Branch: 201 N. Los Angeles St., Los Angeles, CA, 90012, (213)485-5000

Van Nuys Branch: 6411 Sepulveda Blvd., Suite I-J, Van Nuys, CA 91406, (818)909-4115.

If the deceased was an employee of the Dept. of Water & Power, Police Dept. or Fire Dept., contact their respective Credit Unions.

9. Contact the Los Angeles City Employees Association (also known as City Employees Club of Los Angeles) to determine if the deceased carried any insurance with that group. 350 South Figueroa St., Suite 700, Los Angeles, CA 90071, (213) 620-0388, (800) 464-0452
10. Taxes: You should contact someone knowledgeable about estate matters to advise you on current laws and procedures relating to estate and inheritance taxes and property matters. For information on California taxes, contact the Franchise Tax Board, (800) 852-5711, and the Controller's Office, (916) 445-6321. For information on federal taxes, contact the Internal Revenue Service at (800) 829-1040.
11. Employees are urged to have a beneficiary designated for each of their safe deposit boxes, checking and saving accounts.

### **If the retired employee's spouse dies:**

1. Notify the City Employees' Retirement System
2. Send a copy of the death certificate to CERS
3. Notify the CERS to cancel spouse's health and dental coverage.
4. Request CERS to send new beneficiary forms.